MasterCast

Conducting Virtual Video Research

Medallia
COVID-19 has changed the face of Market Research

But companies need to find a way to understand consumer needs more than ever

**NO**
Focus Groups

**NO**
Ethnography

**NO**
In-depth Interviews
Driving organizational change is hard

- Information overload
- Limited time
- Multiple decision influencers
- Abundant data, limited insights
Today's lesson about asking the right question to get meaningful data, brought to you by a 4 year old:

Me: Should I put a banana in your lunch today?
Him: Sure! They are healthy & I'm supposed to bring healthy food.
Me: Will you eat it?
Him: Definitely not. I don't like bananas.
Big data has done wonders for the industry but has ‘dehumanized’ the data. We need to ‘feel the consumers’ rather than read about them.

VIJAY RAJ, VP CMI
UNILEVER
Don't fear the mess!
A clean baby is just a Pampers wipe away
#PampersPooface
What’s your fav Pooface? #pamperspooface
Pampers video placeholder – please hide this slide and replace with Pampers video in ON24
Easy to digest
Captures imagination

Empathetic connection
Engage emotions

Authentic
Break through
South Korea & Japan, First camera phones
First iPhone - No video recording capability!
Facebook launches Facebook Live
500 hours of video uploaded every minute


First camera phone in US
First YouTube video
iPhone with video recording capability
2 billion+ videos served per day
4 billion videos streamed per day
100m hours of video watched per day
113 Million downloads in February alone
300 million daily meeting participants in April

Skype founded
Facebook Live


First camera phone in US
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Create a human connection to customer feedback

- **Increase the depth of feedback** by providing the option to submit video, images or audio in-survey.

- **Uncover meaningful insights** from the spoken word, facial expressions and emotion, as well as objects included in videos or images.

- **Easily find and share content** with employees and executives to drive customer empathy.
Adding value in a wide range of use cases

- Brand Management
- Behavioral
- Innovation
- Experience
- Engagement

Key areas:
- Ad testing & marketing effectiveness
- Usage & Attitudes
- Ideation
- Product development
- Employee
- Customer closeness
- Brand health
- Segmentation
- Path to purchase
- Customer acquisition, retention & loyalty
- Customer
- Citizen
- Employee
- Patient & Healthcare
- Brand Immersion
- Insight Hub
Video stories have immediate business impact

Give the **customer** a face

**Break down denial** about what data reveals

Generate **executive buy-in** and support

**Inspire** employees

Embrace the **power of storytelling**

6x

more information than an equivalent open-end text response
THE LONG AND WINDING ROAD...

TIME

Chicago Booth
VC incubator

MY TEAM

Robert Half

Atlassian

Diamond
PWC

United

Completed
Building and sharing deep understanding digitally.
Virtual life @atlassian

Collaboration Software
Digital first

Global
Teams & Customers

Invested
Strategic Partners since 2018
We believe behind every great human achievement, there is a team. Our mission is to unleash the potential of every team.
The Team

Leisa Reichelt
Head of Research and Insights

Kate Towsey
Research Ops
Agenda

- Context setting
- Super powers
- Our story
- Lessons learned
super powers of remote moderated research
Great communicators don’t just hear the words. Great communicators hear the meaning behind the words.

SIMON SINEK
Don’t waste brilliant minds with monotony
Join research happening remotely

During these times all research has to be conducted remotely and if you want to join any of these sessions, you now can!

The R&I - Research sessions Google Calendar (view calendar) includes all the sessions that researchers within Research & Insights are running.

1. Browse the R&I - Research sessions calendar (using this link or the calendar view below)

2. Click on any session you're interested in

3. Confirm the information about the participant and the session (I'll be in the invite directly or as a Confluence link)

4. If you're available and still interested to join, follow the link from the event to Confluence to register yourself for the relevant session (so the researcher knows you're attending)

5. If you want the event in your calendar, click on the "..." in the R&I - Research remote calendar invite and select "Duplicate" to copy into your own calendar with details in-tact

6. Join the Zoom call at the right time to observe and learn!

You'll join a Zoom waiting room first. Please ensure you are muted and your camera is off, and the researcher will add you as an observer once if the participant has provided consent

There is also a Slack channel #research-sessions-remote you can join to see updates.

Schedule

There is the possibility that a participant doesn't show up - life happens to us all. We have no control over last minute cancellations or no-shows. Please be understanding of this.
5 Super Powers of Remote Moderated Research

- The Why: Context, Intention, Needs, Meaning
- Right People: Balanced and targeted panels
- Effective: Brilliant minds on the right activities
- Data Management: Recreate, Re-use, Respect
- Scale Empathy: Research as a team sport, Exposure hours
Agenda

- Context setting
- Super powers
- Our story
- Lessons learned
RECRUIT
1. Recruit participants from 3rd party vendors
2. Recruit participants from Atlassian tools and products
3. Screening surveys are completed by participants to confirm eligibility for research study (optional)
4. Scheduling for participant to select time slot and get reminders for research

ENGAGE
5. Engage in the appropriate method (Research Methods Inventory)
6. Generate transcripts and notes from the research (user generated and Atlassian generated content)
7. Generate video from research (participant image, PII)
8. Generate data from research

ANALYZE
9. Tagging text, groupings of text, highlights of text
10. Tagging video, slicing of video, highlights of video

DISTRIBUTE
11. Internal: highlight reel, reports, dashboards, keynote, confluence, knowledge base
12. Public: tbd

Here is a great example of distributed research that includes anonymized quotes, and video highlights: Findings: Task-based walk-throughs with Jira users using a Chrome Extension
ITERATE: OUR TEAM SHARES WHAT WORKS, FEEDBACK, PAIN
ENABLE: DIGITAL SOLUTIONS TO ENABLE REMOTE PARTICIPANTS

LEGAL ONLY*

*fine print ATlassian

ATLASSIAN
RESEARCH PARTICIPANT AND NON-DISCLOSURE AGREEMENT

This Research Participant and Non-Disclosure Agreement ("Agreement") is made as of __________, 2020 (the "Effective Date") between Atlassian Pty Ltd, an Australian corporation, and its affiliates ("Atlassian") and the participant identified below ("Participant" or "You"). Atlassian plans to conduct research on the user experience of its products and how Atlassian leverages the potential of every team ("Research"). You have agreed to participate in such a study and, as such, Atlassian requires that you sign this Agreement to ensure that the information you learn during the course of the Research remains confidential. As stated in this Agreement, "You" and "Your" refers to the individual or entity that executes this Agreement. If you are agreeing to this Agreement not as an individual but on behalf of your company, then "you" means your company, and you bind your company to this Agreement.

1. Proprietary Information. You acknowledge that in performing Research, you may observe, receive, or otherwise learn confidential information that may be protected by applicable intellectual property and other laws.

2. Use of Proprietary Information. You may use the Proprietary Information only in the ordinary course of participating in Research with Atlassian. You agree that you will (i) not reproduce or modify the Proprietary Information or any underlying ideas, technology, related software, or portion thereof; (ii) not rent, sell, lease or otherwise transfer or allow access to Proprietary Information to any part thereof or use such Proprietary Information for the benefit of a third party; (iii) not copy, reverse engineer, disassemble, decompile, translate, adapt or disassemble any materials or software related to the Proprietary Information, remove any proprietary markings from any Proprietary Information or otherwise attempt to discover any such source code or underlying Proprietary Information; and (iv) comply with all applicable export laws.

3. Disclosure of Proprietary Information. Any Proprietary Information related to the Research is externally confidential. As such, you shall: (i) hold Proprietary Information in strict confidence and take reasonable precautions to protect such Proprietary Information (including, without limitation, all precautions you employ with respect to your own confidential materials); and (ii) not divulge any Proprietary Information to any third party.

4. Consent to Collection of Recordings and Device Information. You agree that Atlassian may collect voice recordings or photographs of your face, audio recordings of your voice, and may access the device on which you are conducting Research to capture recordings of your actions and/or device information during Research, including the device screens ("Screen Recordings"). Specifically, you agree that, in connection with Research, Atlassian may record your facial expressions through the use of a front or side camera, your voice in the context of capture and feedback, your computer screen actions as you perform tasks, your answers to certain survey questions and comments and other data.

5. Ownership and Use of Research Data and Feedback. You acknowledge and agree that Atlassian shall own all right, title and interest in and to all results of your Research, including all Screen Recordings, Device Information, conclusions, suggestions, and feedback comments made by you in the course of the Research ("Research Data"). You hereby make all assignments necessary to accomplish the foregoing.

6. Term, Confidentiality Period. This Agreement shall continue in effect until terminated by Atlassian upon written notice to You. Your obligations with respect to Proprietary Information under this Agreement expire five (5) years from the date of receipt of the Proprietary Information (except that with respect to any trade secrets the obligation shall be perpetual). These obligations shall survive any termination or expiration of this Agreement.

7. Indemnification. This Agreement imposes no obligations with respect to information with which (i) was in your possession before receipt from Atlassian, (ii) is or becomes of public knowledge through no fault of you, (iii) was rightfully disclosed to you by a third party, without restriction on disclosure or (iv) is developed by you without use of the Proprietary Information and such independent development can be shown by documentary evidence. You may use this information only as permitted by local law. Your obligations to comply with the terms of this Agreement shall be limited to your compliance.

8. Return or Destruction of Proprietary Information. Upon termination of this Agreement or written request from Atlassian, you shall: (i) cease using the Proprietary Information, (ii) return or destroy the Proprietary Information and all copies, notes, reports, records, and summaries of information that you have compiled with those obligations.

9. Disclaimer. You acknowledge and agree that the Research and any Proprietary Information formed in connection therewith, including, but not limited to software and content, is provided "AS IS" and WITH ALL FAULTS. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, ATLAS LASSIAN EXPRESSLY DISCLAIMS ALL WARRANTIES, EXPRESS, IMPLIED, OR STATUTORY, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NONINFRINGEMENT.

10. Governing Law. This Agreement shall be governed by and construed under the laws of the State of California, without giving effect to its conflict of law principles.

By checking the box(es) below, You agree that Atlassian may use Your Licenses in connection with its Research and in using and creating the Research Recordings. If it is okay for Atlassian to:

- Record audio
- Record video
- Take screenshots of your computer screen
- Have observations over the phone
- Talk to stakeholders about your session

By signing below, You agree that You have read and understand this Agreement and that You have the right to enter into this Agreement.

*Thanks to Teams for your participation in Atlassian Research! A copy of this agreement will be sent to you.

G'day from Atlassian!
This form includes information about what is and is not shared in the research session, and additional details about your participation.

About Atlassian: We’re Atlassian, we make collaboration, development, and issue tracking software that helps teams of all types do their best work. Atlassian, on behalf of itself and its subsidiaries ("atlassian," "we" or "us") is always looking for ways to make our services smarter, faster, and more useful for you, so we occasionally conduct research where participants are asked to provide insights or feedback ("research").

Your participation. As the participant named below ("You" or "Your") understand that Your participation in the research is completely voluntary. This means that you do not have to participate in the research if you do not want to. For any reason and at any time during the Research, You can request a break or choose to stop participating. Atlassian can also end the Research session at any time.

You are asked to provide feedback, such information (collectively, "Feedback"). We want to learn more right or wrong answers to the questions we ask. You refrain from sharing information that may be any time. You can say "no comment" or "I'd rather not say."
API
Automate data handling

Partnerships
Chose vendors who want to grow with you


## STANDARDIZE TO REUSE: MAKE IT EASY TO FIND VALUE

### The results matrix

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<td>9</td>
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<td>Participant journey stage</td>
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<td>Participant CSAT</td>
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**26 Results**

### Standard

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### Custom

- **Product Name**
  - Access
  - AccessRequirement
  - A11y
  - Bamboo
  - Cognitive
  - Confluence
  - Auditor
  - Buyer Experience

- **A11y Status**
  - (1)
  - (1)
  - (1)

- **Country**
  - Australia
  - India
  - United Kingdom
  - United States

- **Language**
  - English

- **Media Source**
  - Video

- **Upload Source**
  - Video Capture
  - Website
# OUR REMOTE RECORDING PRACTICE TODAY

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<tr>
<th>Invite</th>
<th>Manage Participants</th>
<th>Inform Consent</th>
<th>Record</th>
<th>Capture &amp; De-identify</th>
<th>Admit Observers</th>
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<td><img src="image" alt="Profile" /></td>
<td><img src="image" alt="Group" /></td>
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</tbody>
</table>
| 1. Universal Zoom Link  
2. Information Message  
3. PDF Consent Agreement | 1. Waiting Room  
2. Anonymize Observers  
3. Mute Observers  
4. Admit Participant | 1. Link to Digital Consent  
2. Practice Q&A  
3. Gain Consent Options  
4. Digitally Sign Agreement | 1. Record | 1. Read Confirmation Page  
2. Participant ID in Recording  
3. Participant ID link to PII | 1. Admit |

<p>| | | | | | |</p>
<table>
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<tbody>
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<td>Zoom 8 Recruitment Platforms</td>
<td>Zoom</td>
<td>Zoom Digital Agreement</td>
<td>Zoom</td>
<td>Zoom Participant #ID</td>
<td>Zoom</td>
</tr>
</tbody>
</table>
TRANSCRIPTS CONVERTED TO CARDS

Trello
Ingesting transcript blocks into cards

Theming as a remote team
Tagging and theming in digital board
VOICE AND VIDEO IN OUR REPORTS

Confluence & Slides
Research reports are multimedia

Embedded Video
Sharing customers own words and voices
STORY TIMES

Key Themes
Story times is a weekly series raising awareness of a key initiative

Customer Voice
Embedded video of poignant customer stories are compelling
VIDEO SHARE-BACKS

Async
Global
Audience when available

No cherry-picking
Context with clips

Repeatable
Craft the critical message with powerful words.
repeat. repeat. repeat.
Methodologies using Remote Video

- Diary studies
  - Longitudinal buyer journey
  - Migration journey

- Cognitive Testing
  - Top Tasks
  - Surveys

- Discovery Interviews
  - Remote Moderated

- Benchmarking
  - Moderated task completes

- Survey Response
  - Ask & Record Answer

- Prototype Testing
  - Moderated and Unmoderated

- UX validation
  - Moderated and Unmoderated
RESEARCH VIDEO MILESTONES

**Compliant**
- Asset Management

Dec

**Automated**
- Informed Consent Integration
- Taxonomy
- Transcriptions
- Showreels

February

**Adopt & Amplify**
- Empathy Sessions
- Team Sport Sharing

Today

**Expand**
- R&ITV Streaming Insights?
- Player API
- Survey Recordings

Future
Agenda

- Context setting
- Super powers
- Our story
- Lessons learned
Lay foundations that promote future growth
It takes a team